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Approved For Release 2002/05/08 : CIA-RDP78-04718A001100050061-9

IV. Survey Method

The methods used on the Logistics Office survey closely followed those in common use throughout the federal government and used to some extent on previous surveys within the Agency. They included use of employee prepared questionnaires, work audits by members of the survey team to supplement or clarify information provided by the employees, preparation of final position descriptions by the survey team and verification of these by employees and supervisors, and preparation of evaluation statements by team members in support of their grade recommendations.

The basic questionnaire used (Annex C) was adapted from a survey questionnaire in use in another federal agency. It covered three basic elements of information: (1) job controls, (2) duties, and (3) qualifications requirements. To supplement the basic questionnaire, specialized question lists were developed for specific categories of positions, some of them specifically for logistics type work, with a view toward providing employees and supervisors detailed indication as to the items of information significant for classification purposes.

The general questionnaire and special question lists were disseminated to employees and supervisors through the medium of a series of meetings, at which a brief verbal explanation was provided by the team leader or one of the survey classifiers as to the nature of the survey, its timing, and how to complete the questionnaire form. An effort was made to reach as many employees as possible, but some modifications in this procedure had to be made in certain situations, such as in the case of chauffeurs, telephone operators, etc., in which it was not feasible, or particularly advantageous for that matter, to attempt to assemble them in one location at the same time. In these cases, the supervisors were provided with the necessary guidance and assistance and asked to pass the information on to the individual employees.

The duties described on the questionnaire were to be those officially assigned to the employee and being performed by him at the time of the survey. In the case of vacancies, or employees on leave or otherwise absent, the supervisors were asked to provide the necessary information. An exception to this was made in the case of the Procurement Division, which was in the process of shaking down into a new organizational alignment; positions in this component were described as they were expected to operate under the new organization. Recourse to position descriptions previously prepared in connection with classification surveys of particular components or in individual cases was generally discouraged, since in many cases these descriptions were obsolete, written on a projected basis, or otherwise unsuitable for the present purpose. In actual practice, considerable latitude was afforded the operating components in this regard, particularly where descriptions had been prepared fairly recently, with the exhortation that any material used as a reference in preparing the questionnaires be carefully reviewed by the employee and supervisor to assure that it remained current and was appropriate to the current

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work situation. In the case of the Procurement Division, in which a recent prior survey had resulted in descriptions covering in some fashion nearly every position, previously written material was resorted to rather freely, this condition being aggravated by the fact that job coverage in this division was on a projected rather than a current performance basis.

The employee-provided information on two of the three major items in the questionnaire, those concerning Job Controls (subdivided into supervisory controls and regulatory controls) and Duties, signed the form and passed it on to his immediate supervisor. The supervisor, in addition to reviewing the employee's statement for accuracy and completeness, provided the information for the third item of information, Qualification Requirements. In connection with the Qualification Requirements, interim standards had been developed covering a majority of the types of positions common to the Logistics Office and various other specialities. Copies of these were made available to supervisory personnel for use where applicable. Questionnaires completed by both the employees and supervisors were forwarded through channels to the survey team. A period of five days was allowed for the completion of the questionnaire by the employees and review by the supervisor.

On the basis of their review of the questionnaires submitted, the survey team members ascertained instances where additional information or clarification was needed and made arrangements to secure the needed data either directly from the employee or by consultation with unit supervisors at various organizational levels. In the Procurement Division, where duties statements were based on an organization pattern not yet operative, position data were sought in almost all instances from supervisory personnel familiar with the details of the projected organization.

At the conclusion of the fact finding on his particular survey assignment the survey classifier proceeded to prepare the final draft of the position descriptions. Final drafts when completed by the teams were referred back to the employee and his immediate supervisor for certification as to the accuracy and adequacy of the information included therein. The final drafts when cleared and attested to by all concerned became the definitive body of information on which subsequent analysis and evaluation were based.

The evaluation statements, which were for the purpose of presenting the technical classification reasons prompting the grade recommended, were prepared as separate documents apart from the body of the position descriptions and, being expressions of technical opinion on the part of the respective survey analysts, were not subject to clearance with employees or supervisory officials. The evaluation statements were appended to the final certified drafts of the descriptive information and the combination of the two completed the position coverage.

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The initial presentation of the survey results to the Logistics Office consisted of a summary list of the positions covered, with a comparison of currently authorized grade, if any, grades proposed by Logistics Office, and grades recommended by the survey team. This listing provided a working paper on the basis of which areas of disagreement could be isolated and brought up for detailed discussion. The listing initially furnished did not represent final completion of Phase III, since grades of all positions were not finally determined and in about 10% of the recommendations the descriptions and evaluations had not yet been finalized. In this respect the classification procedure fell considerably short of the ideal. The optimum arrangement would have been to complete all final drafts of positions descriptions and to complete evaluation statements before presenting the final results. As it worked out in the instant case some of the descriptions and evaluations were written after the fact. The basis for this modification in the usual procedure was the necessity to sacrifice some of the procedural aspects to the need for completing as much as possible of the project within the time limit specified.

The remainder of the classification procedure concerns the negotiations which followed the presentation of the survey findings and implementation of the final results. For each major organizational component a list was compiled of the positions on which the Chief of the component wished further information and clarification. The final draft of the position descriptions and evaluation statements on the positions in question were submitted to the individual Staff and Division Chiefs and their review of this information provided the necessary clarification or convincing arguments which led to acceptance of the survey findings in a certain number of cases. With respect to positions remaining in contention after review of the written information, a series of meetings was scheduled to take place between representatives of the organizational components and appropriate representatives of the Classification and Wage Division. By means of discussions at these meetings, additional cases were resolved to the satisfaction of all concerned. Cases remaining unresolved after meetings at the Staff and Division Chief level, were referred to a higher echelon, first to the Assistant Chief for Operations and ultimately to the Chief of Logistics. The successive reviews given to questionable areas succeeded in limiting the number of cases submitted to the Chief of Logistics to a bare minimum.

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